Government Librarians Get Savvy!
Metrics! Metrics! Metrics!

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Overview

- **About Outsell**
- **Recent Benchmark Data and Trends**
- **Metrics Self Assessment: What's Worked for You?**
- **Meaningful Metrics**
- **Metrics and Strategic Assessment**
- **Stakeholder Management**

Overview, cont'd.

- **Needs Assessments**
- **ROI (Qualitative and Quantitative)**
- **Customer Satisfaction and Loyalty**
- **Imperatives for Information Managers**
- **Questions and Discussion**

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About Outsell

- **Outsell is the only worldwide research and advisory firm that delivers advice and information industry research to information managers, librarians and publishers.**

- **We provide consultation and custom research in all areas of library management**

- **Outsell invests significantly in original research to guide clients in optimizing their strategies, plans, and performance.**

About Outsell

- **Outsell clients receive information in the form of daily industry "Insights", reports, analyst discussion and access to our primary databases.**

- **Outsell has about 100 library clients in Government, Corporate and Education in the U.S., Canada, U.K. and Australia.**

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About Outsell

Most of our 40 analysts work virtually, but you can find us at:

www.outsellinc.com

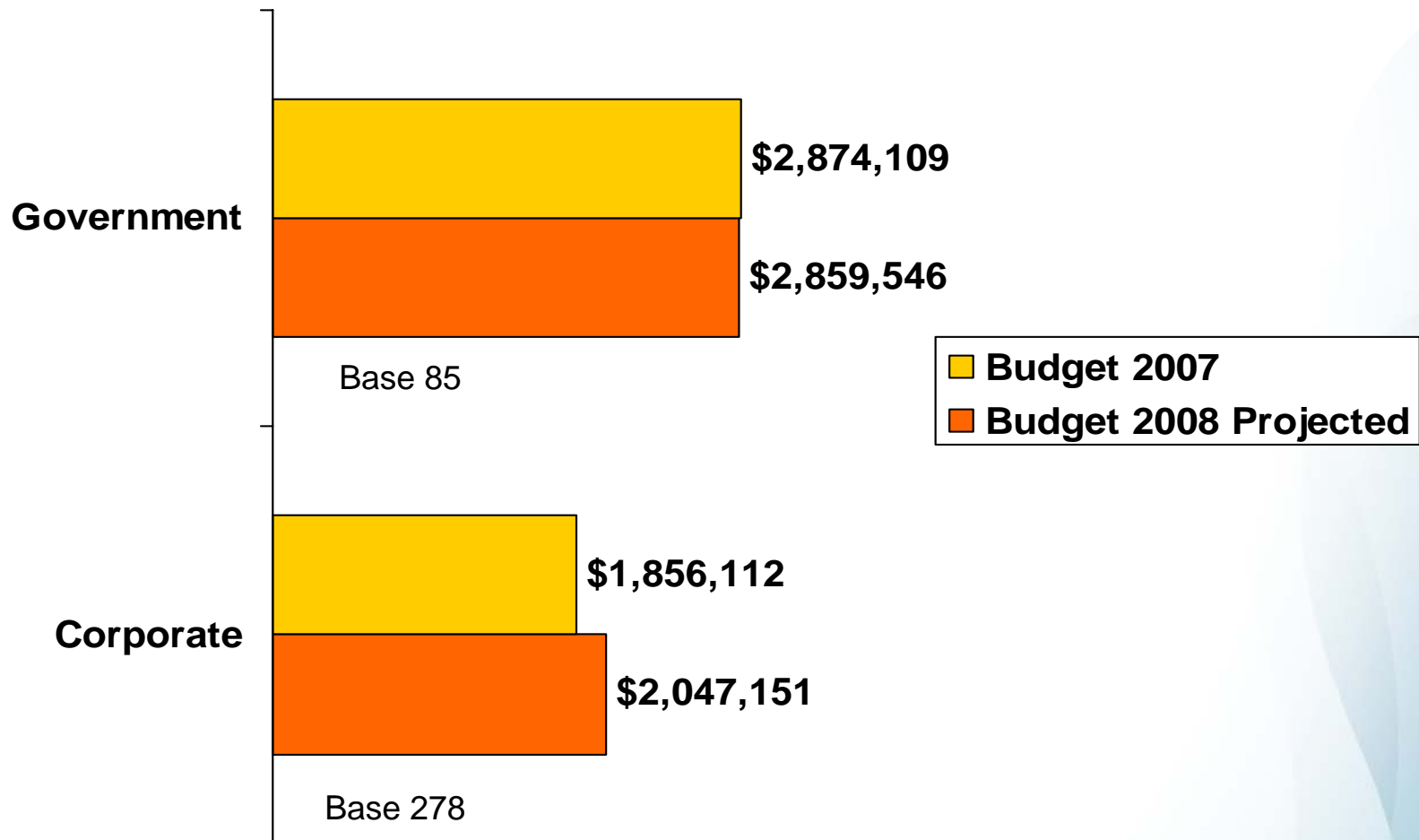OUTSELL

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Benchmarks and Trends
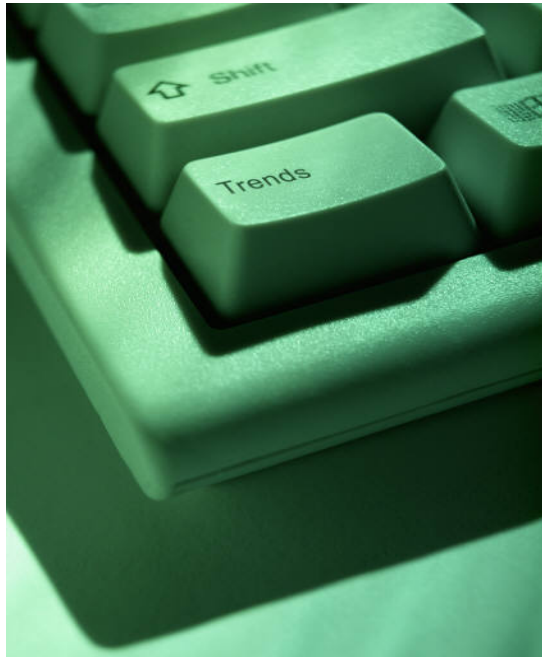
Top Challenges of Government IM Functions

- **Budget constraints (51%)**
- **Staff shortages (33%)**
- **Keeping up with technology (30%)**
- **Transition of print to electronic (21%)**
- **Increased workload (18%)**
- **Not valued by organization (17%)**
- **Marketing/promoting of service (17%)**

Source: Outsell's Information Management Benchmark Study, October 2007

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Library Budgets

Government

$2,874,109

$2,859,546

Base 85

Budget 2007
Budget 2008 Projected

Corporate

$1,856,112

$2,047,151

Base 278

Source: Outsell's Information Management Benchmark Study, October 2007

Average IM FTEs and Contractors

Segment	FTE 2007	FTE 2008 Projected	Contractor 2007	Contractor 2008 Projected
Government	12.1	12.3	4.2	4.1
Corporate	8.1	8.0	1.3	1.4

Source: Outsell's Information Management Benchmark Study, October 2007

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IM Users and Market Penetration

	Actual Users	Potential Users	Market Penetration
Government	9,817	14,061	70%
Corporate	1,778	6,027	30%

Source: Outsell's Information Management Benchmark Study, October 2007

Budgets and Staffing Per User Ratios

	Government	Corporate
Budget per Potential User	$204	$308
Budget per Actual User	$293	$1,044
Potential User per IM FTE	1,162	744
Actual User per IM FTE	811	220

Source: Outsell's Information Management Benchmark Study, October 2007

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Strategic Management Practices

	Government		Corporate	
	2004	2007	2004	2007
Base	*184*	*144*	*312*	*465*
	%	%	%	%
Business planning or function strategy	**46**	**59**	**63**	**55**
User advisory group or board	**38**	**34**	**35**	**28**
Benchmarking	**21**	**21**	**38**	**29**
Executive Advisory Group or Board	**20**	**29**	**21**	**14**
Internal service level agreements	**30**	**27**	**27**	**20**
End-of-project debriefs with internal clients	**18**	**15**	**19**	**20**

Multiple responses allowed.

Source: Outsell's Information Management Database, October 2007

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Performance Measurement

	Government		Corporate	
	2004	2007	2004	2007
Base	*183*	*144*	*312*	*465*
	%	%	%	%
Qualitative user needs (interviews, focus groups)	36	52	46	46
Quantitative user seeds (surveys)	37	49	35	29
Quantitative user satisfaction and loyalty	20	33	21	27
Return on Investment (ROI) studies	10	19	11	15

Multiple responses allowed.

Source: Outsell's Information Management Database, October 2007

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Metrics Self Assessment
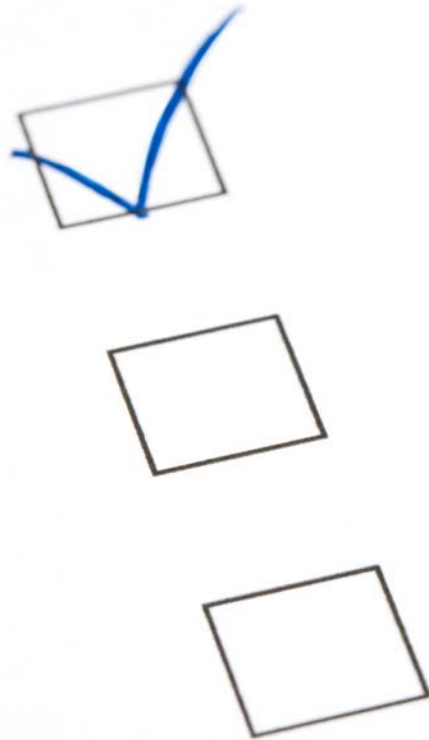
Meaningful Metrics

Operational Metrics

- **Measure day to day activities**
- **Needed to manage your function**
- **Of interest to your function, BUT NOT your organization**
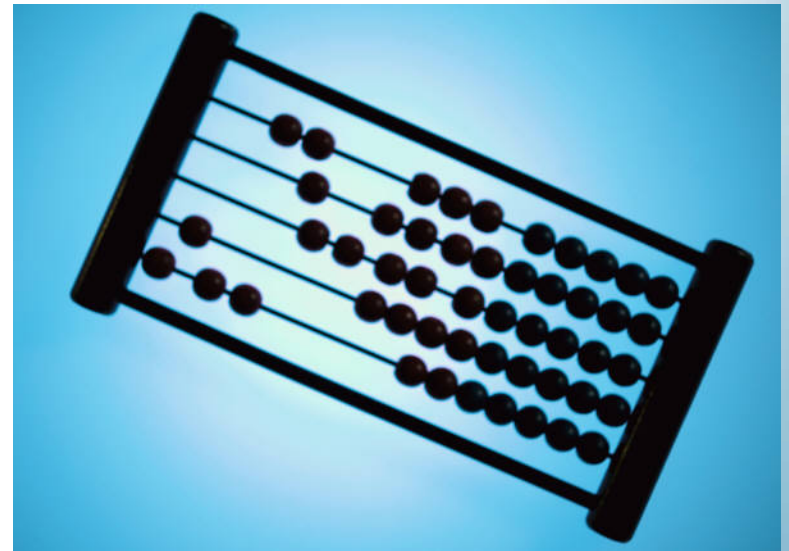
Strategic Metrics

- Linked to actions in your strategic plan which is aligned with your larger organization

- Measures your value to the organization

- Of interest to your function AND your organization

- Qualitative and quantitative

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Strategic Management:
The "Holy Triangle"

Strategic Assessment

Organizational
Alignment
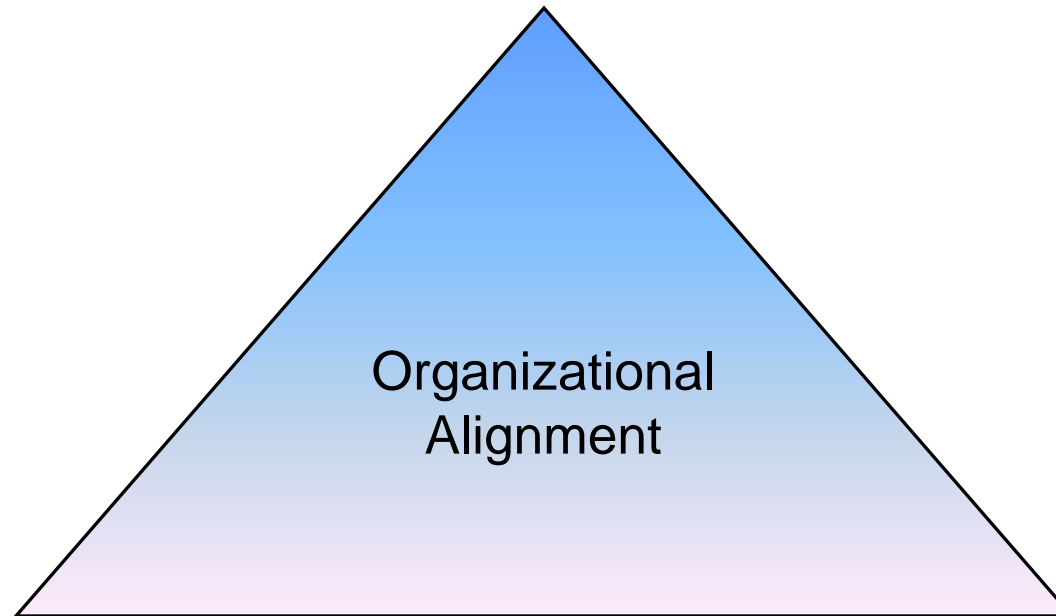
Stakeholder Management

**Needs Assessment and
Client Satisfaction / ROI**

Strategic Assessment

- **Provides direction**
- **Examines values and drivers**
- **Assesses competencies and status**
- **Considers external environment**
- **Ensures alignment**
- *Defines strategic metrics*

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Strategic Assessment – How to

➢**User and stakeholder research**

➢**Where are we now?**

➢**Where do we want to be?**

➢**What are the critical strategies of your larger organization?**

Strategic Assessment, cont'd

- **Brainstorm as a team !!**
- **Determine 6-8 strategic actions**
- **Assign owners**
- **Determine metrics for these actions**
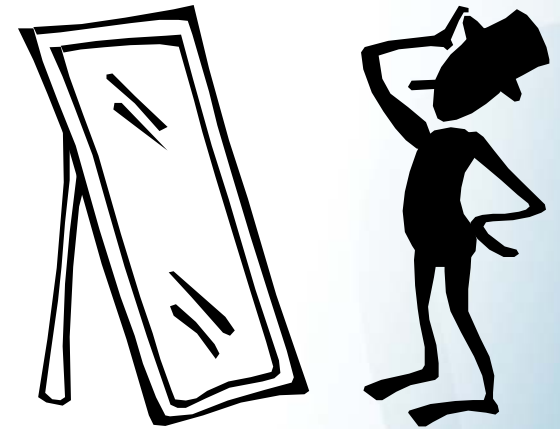
Manage your function according this plan

Strategic assessment is the first step in defining your metrics.

Stakeholder Management

- **Targets decision-makers**
- **Examines big picture**
- **Focuses on bottom line**
- **Hones value proposition**
- **Ensures alignment**

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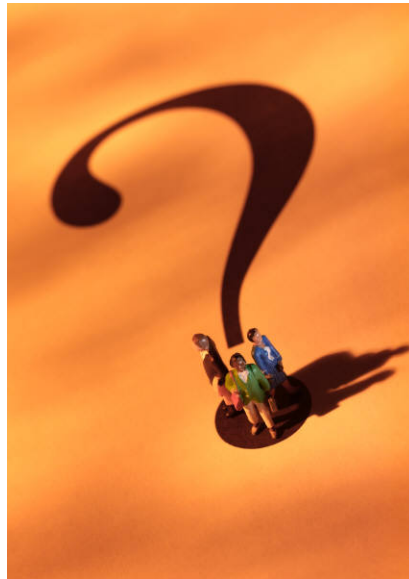
Needs Assessment

"Our customers have told us that everything we do is wrong. Therefore, we need new customers."

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Needs Assessment - Why Do It?

- Set strategic planning objectives
- Determine target market priorities
- Plan future products and services
- Make staffing and budget decisions
- Make product portfolio decisions

Needs Assessment

- **Targets customers**
- **Takes a pulse on the market**
- **Examines user requirements**
- **Reveals service value/gaps**
- **Identifies competition**
- **Ensures alignment**

Types of Questions

- How much time?
- What's the cost of that time?
- How do users obtain information?
- How would they prefer to obtain it?
- What are the major obstacles to getting information?
- How do problems differ among various user groups?

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Using the Findings

IM Services Offered 2008

- Research & Analysis
- User Desktop Resources
- Content Management & Enhancement
- Help Desk & Training
- *Intelligence Hub*
- Records Management
- Vendor & Contract Management

Cost / Resource Requirements (High / Low)

Value / Impact (Low / High)
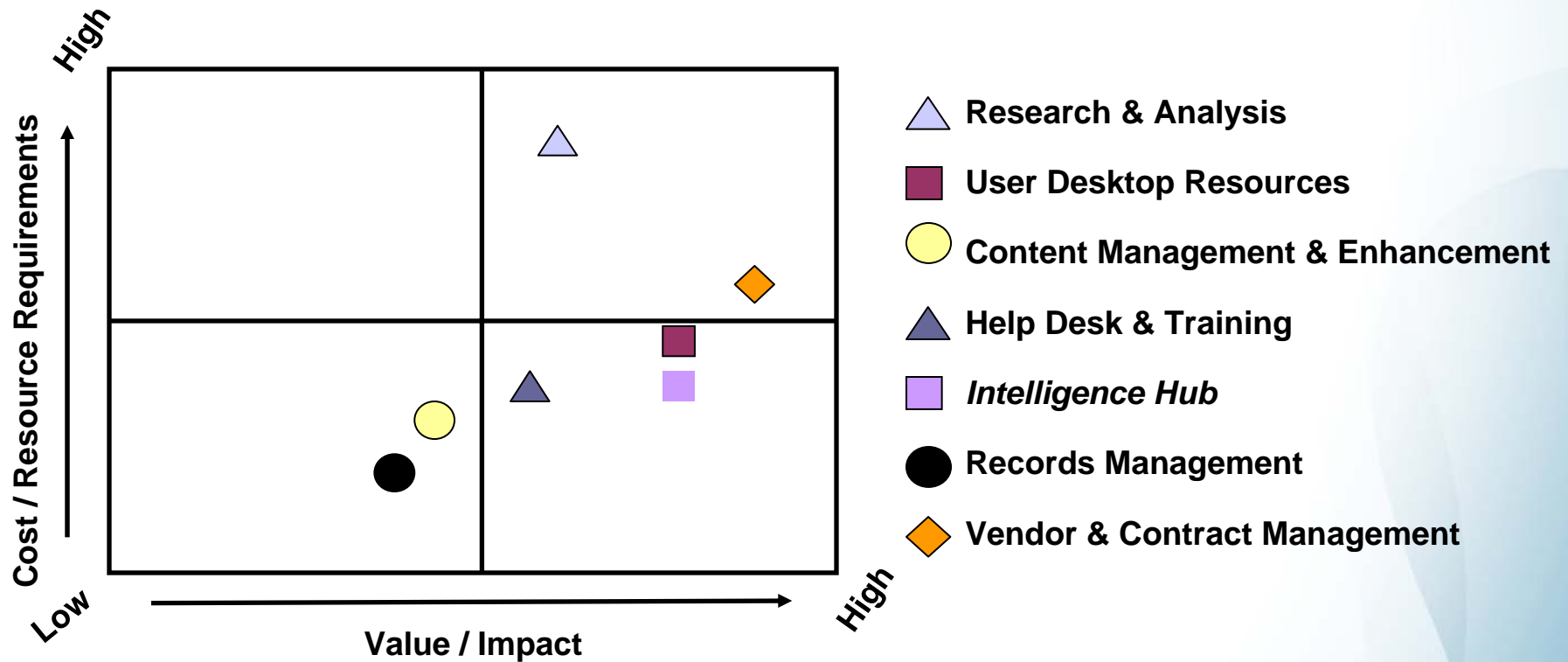
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Customer Satisfaction and Loyalty

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Customer Satisfaction Studies

- **Provides measurable feedback**
- **Tests new products and services**
- **Allows for customer testimonials**
- **Provides loyalty measurements**

HOW DID WE DO?

Recently X Library provided you with research services. Your feedback is very important to allow us to continually improve the service we provide. We ask you to take a few minutes to complete these short questions. Customer Satisfaction scores for the X Library are posted on our website.

(your logo here)
http://www.yourwebsite

Please rate this service with regard to :

	Low				High
Satisfaction with results	1	2	3	4	5
Confidence in staff abilities	1	2	3	4	5
Professionalism and courtesy of staff	1	2	3	4	5
Importance of this service to you	1	2	3	4	5
Overall quality of this service?	1	2	3	4	5

Results provided in agreed upon time?   ____yes   ___no

Would you recommend Research Services of X Library to a colleague?   ____yes   ____ no

Amount of time this service saved you? (insert #)   ____mins.   ____hrs.   ___days   ___ wks.

How did the research results provided by the library make an impact on your project?

Comments/suggestions:

Your employee code: (*required*)_____

If we may quote your remarks, please provide your: **Name:**   **Ext.**   **Email:**

If you have additional questions or comments concerning Library services, please contact Name, Library Manager ext. 6-9230 or librarymanager@library.gov

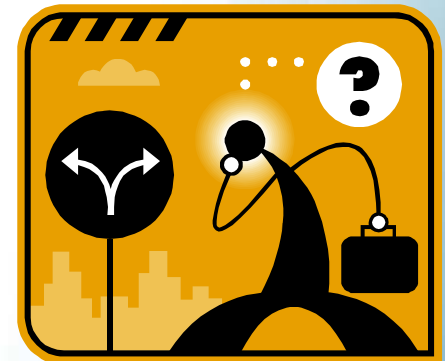*Thank you for taking the time to provide this valuable feedback.*

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ROI

Return on Investment/ROI

- **Examines user requirements**
- **Reveals service value/gaps**
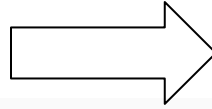- **Identifies competition**
- **Ensures alignment**

ROI Questions Asked

- **Time saved**
- **Money saved**
- **Revenues gained or supported**
- **Decisions supported**

What we found →

"Users with access to an enterprise library or IM function realize substantial benefits when they use it."

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Average ROI Savings

- Time Savings

  77% of respondents saved 9 hours per transaction

- Direct cost savings

  47% of respondents saved in direct costs:

  $2,218 (U.S.)

  Library supports decision making – 65%

- Library helps generate revenue – 46%

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"It would be a mistake to consider the enterprise library expendable or a budget drain."

- Roger Strouse, Outsell

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Qualitative Research

Qualitative Research

- **The numbers alone do not tell the story.**

- **Qualitative feedback from users illuminates value**

- **Both quantitative and qualitative data are required for a complete value proposition.**

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Qualitative Research, cont'd.

- **Utilize a picklist on an ROI survey**

- **Input from interviews, focus groups, surveys, user groups or emails**

- **Actively solicit user testimonials**

- **Embed testimonials into reports**

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Balanced Scorecard
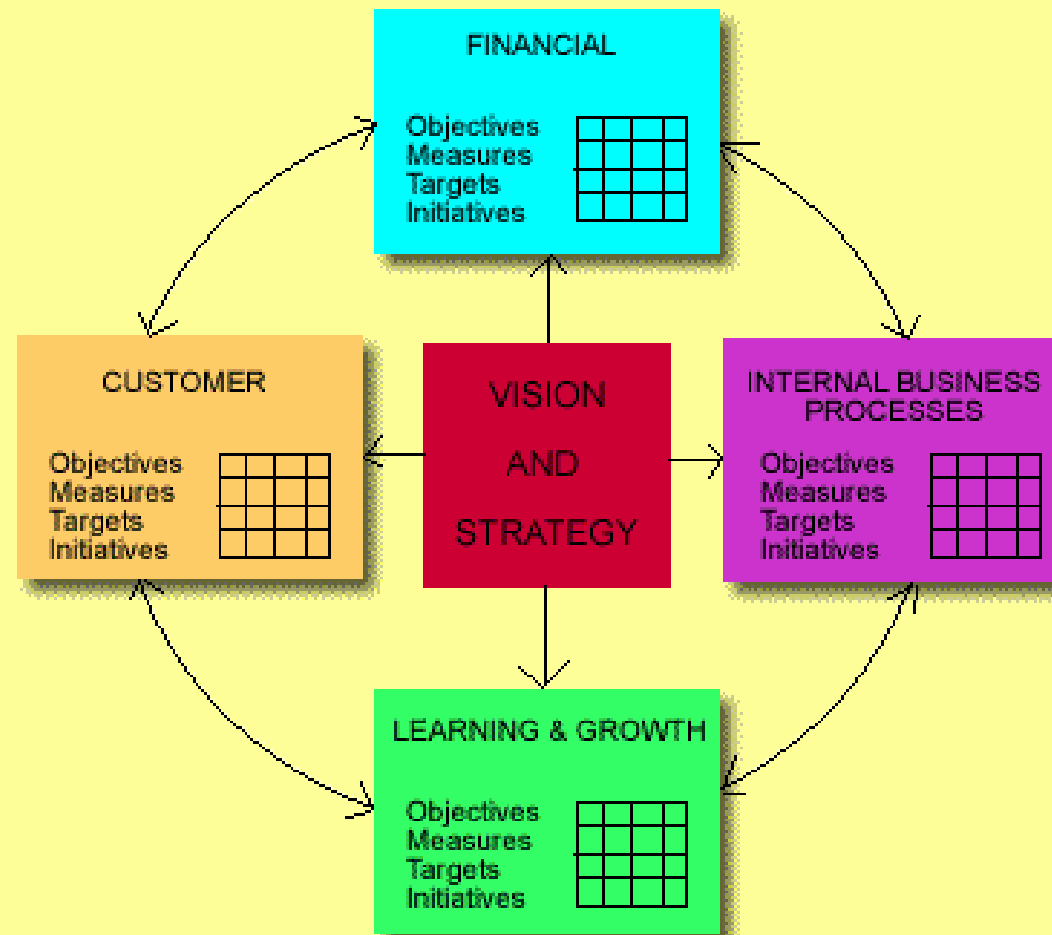
Imperatives for Information Managers

Make Time to Run a Business

Link IM Priorities Directly to Organization and User Priorities

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Start Now.

It's too late to begin your metrics program when the shoe is about to drop!

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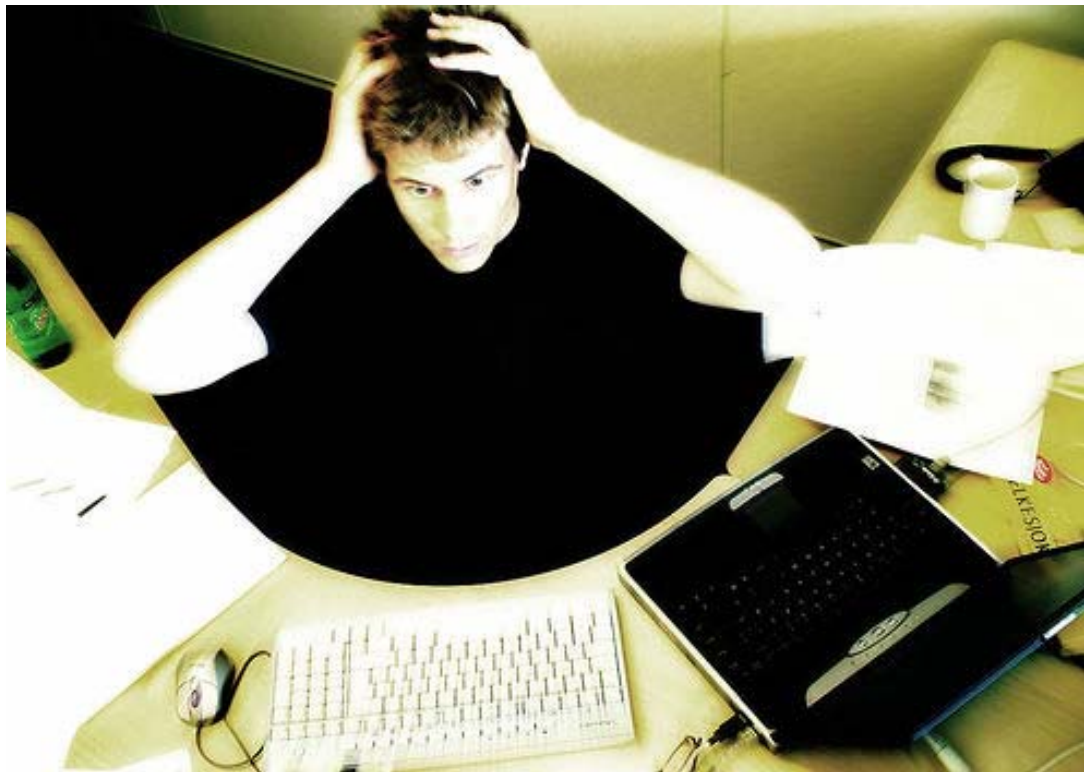
Include Quantitative and Qualitative Elements to Show the Total Picture

Successful Metrics….

- **Help manage the library (usage of products and services)**

- **Mirror organization-wide metrics standards (scorecards, Total Quality Management methodologies)**

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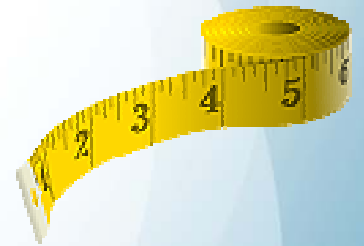
Successful Metrics….

- **Showcase value (focus on outcomes, cost-savings and user-reported value)**

- **Play to users', stakeholders' and executives' values and needs**

- **Support continued funding – justify the costs of operating the Library (ROI, cost/benefit analysis)**

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Questions and Discussion

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